

**BEFORE THE WASHINGTON UTILITIES AND TRANSPORTATION COMMISSION****Dockets UE-190529 & UG-190530  
Puget Sound Energy  
2019 General Rate Case****PUBLIC COUNSEL DATA REQUEST NO. 185:****Re: Financial Assistance Programs.**

Please refer to PSE's response to Public Counsel Data Request No. 104, subpart f).

- a) Please list the 11 agencies with which PSE works.
- b) Does PSE have any plans to work with any additional agencies? If so, please specify.
- c) Regarding the statement: "The process to obtain Energy Assistance is complex for customers and involves entities outside of PSE" and to the statement "PSE's ability to recognize and respond faster to customers that need assistance is an important benefit." Please describe in detail the process necessary to obtain Energy Assistance and indicate those steps in the process for which PSE is able to "respond faster."
- d) Regarding the statement that "gaining stakeholder input when developing project requirements was critical to ensuring all details were captured" – please list all stakeholders providing input and the way in which such input was sought by and provided to PSE. Please provide any documents, PowerPoints, or other materials associated with the collection and discussion of the 'stakeholder input'.

**Response:**

- a) The 11 Community Action Partnership ("CAP") agencies Puget Sound Energy ("PSE") works with are:
  1. Snohomish County
  2. The Opportunity Council
  3. CAC of Lewis/Thurston County
  4. Byrd Barr Place
  5. HopeLink
  6. Multi Service Center
  7. Pierce County Human Services
  8. Skagit County
  9. HopeSource
  10. Kitsap Community Resources
  11. Metropolitan Development Council.

- b) No, PSE does not have any current plans to work with any additional agencies.
- c) The overall process has been cumbersome due to the number of phone calls a customer needs to make while seeking assistance. The process in general involves the customer finding the applicable agency, contacting the agency to make an appointment, completing an application, informing PSE that an application has been submitted, receiving confirmation from the agency that the application has been approved, and informing PSE that funds will be coming.

Please see PSE's Response to Public Counsel's Data Request No. 122(a) for additional details.

- d) PSE collaborated with all 11 CAP agencies, including the Washington Department of Commerce. There were various ways PSE sought input and feedback:
1. **Initial as-is process sessions (in-person):** The PSE team met with each CAP agency individually to document their as-is process as well as gather agency input on pain points and future state "wish list."
  2. **Kick-off Stakeholder Survey (Online):** In September 2018, an anonymous online survey was sent to agency managers providing an opportunity for stakeholders to give anonymous feedback on project team effectiveness, change management efforts, project confidence and open-ended feedback on the project overall. Attached as Attachment A to PSE's Response to Public Counsel Data Request No. 185 is the Survey Summary.
  3. **Product Demos (in-person & via WebEx):** The PSE team hosted three product demonstrations that showcased functionality and provided time for feedback on April 10, 2019, July 9, 2019 and July 11, 2019. Attached as Attachments B-E to PSE's Response to Public Counsel Data Request No. 185 are the Product Demo decks that were presented.
  4. **Post Demo Anonymous Online Surveys (in-person & via WebEx):** An anonymous online survey was sent to each demo participant providing an opportunity for stakeholders to give anonymous feedback on project team effectiveness, change management efforts, project confidence and open-ended feedback on the project overall. Attached as Attachment A to PSE's Response to Public Counsel Data Request No. 185 is the Survey Summary.
  5. **Subject Matter Expert Training July 29 –July 31 (in-person):** Agency subject matter experts attended a training and were asked to provide feedback throughout training via open discussion, notecards and an online survey. Throughout the training, notecards were made available for providing anonymous feedback and were addressed. An anonymous

online survey was sent following the training providing an opportunity for open-ended comments and feedback. Attached as Attachment A to PSE's Response to Public Counsel Data Request No. 185 is the Survey Summary.

6. **Weekly Agency Check-in Meetings (WebEx):** Weekly check-ins have been held every Wednesday at 1:30 p.m., beginning on June 26, 2019, and are scheduled to continue through October 31, 2019, and beyond as needed. An additional 9:30 a.m. time was added on September 25, 2019, in response to feedback that a morning time may be better for some agencies. Each check-in included time for feedback and, following the launch, time for defect and enhancement discussion.
7. **Low Income Advisory Committee Meetings (in-person & via WebEx):** The Energy Assistance ("EA") project utilized this already existing meeting to present the progress of the EA project and open up discussion for feedback and questions. Attached as Attachments F-I to PSE's Response to Public Counsel Data Request No. 185 are the meeting presentations.